

Managing Spatial Data: The FlexiGrid Experience

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Today's topics

Timeline

Concept and Implementation

Lessons learned

Options

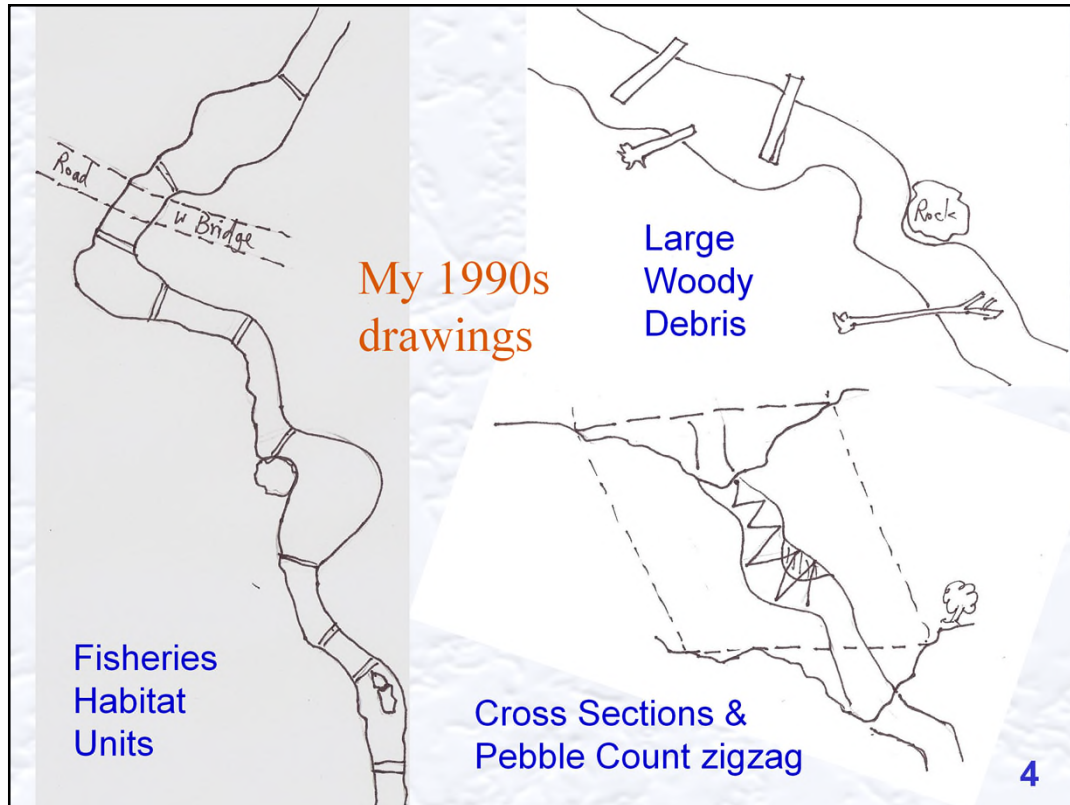
Timeline: History

- 2007, June – FlexiGrid concept articulated after working with PHAB protocol authors from USGS and EPA
- 2007, November – first FlexiGrid system applied to CA interim PHAB protocol
- 2008 Interim protocol system used in a pilot study with Alameda County Clean Water Program
- 2008 FlexiGrid applied to field-collection and processing of PHAB and periphyton data according to the developing Surface Water Ambient Monitoring Program (SWAMP) protocols
- 2009 A crosswalk to the SWAMP database was added to the FlexiGrid data entry template
- 2010-2012 extensive use by San Francisco Bay Region waterboard
- 2014 Implementation of the FlexiGrid concept for a customized pebble-count protocol in the North Coast

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The idea was first depicted in a drawing and a spreadsheet in the summer of 2007. I created and implemented a functional data entry and Endpoint template system shortly after that, to accommodate an interim PHAB protocol; the customized FlexiGrid is still the only data processing option.

The system was practically re-designed to accommodate the new (2007) [SWAMP protocol and the emerging capture of algae cover data; in one year we used 4](#) version of the SWAMP data sheets as they kept changing (talking about flexibility...). Some data were captured in the field using FlexiGrid template on a field computer. When the SWAMP database launched its PHAB module, I added a crosswalk for a seamless data transfer into the SWAMP database,

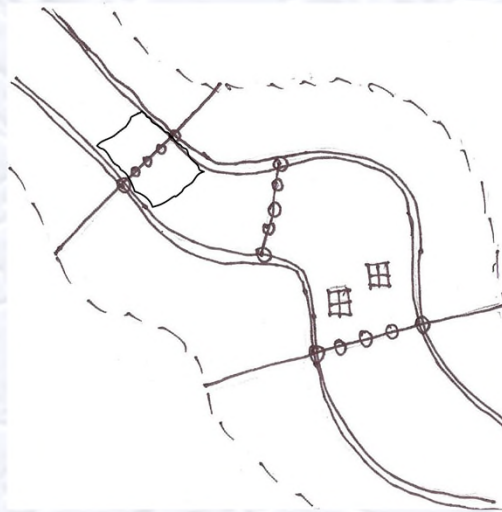


I have been working on different protocols that had spatial assessments for many years

Some of the protocols I encountered

Fisheries habitat assessments DFG style (Flossi&Reynolds...)
Thalweg profile & cross section surveys
Pebble counts
Large Woody Debris assessments
Riparian plots & canopy density
Residual pool volume (V^*)
Collection of vertical composite samples in water column
Sampling storm runoff in outfall & creek networks
Bird point-counts in a 50m-radius circle
Flow discharge measurements
Physical Habitat assessments RBP style
Physical Habitat assessments EMAP style
Physical Habitat assessments NAWQA style
(more)

My 2000s drawings



Transects
Transect points
Intertransects
Transect Plots
Riparian plots
Stream segments

...
...
...

Lots of "Crosslines", and "Plots"

...and the internal hierarchy gets more and more complicated

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When complex physical assessments became popular, spatial sampling frames became more and more elaborate and comprehensive

The Challenges:

Multiple Protocols: Identify the common elements and components among diverse protocols and spatial Sampling Frames

Links: Find a universal way to connect each monitoring Result to the specific spatial component it represents, in a flexible data structure

Hierarchy: Find a way to map multi-dimensional sampling frames with internal hierarchy

Endpoints: Find a simple way to generate assessment Endpoints from desirable aggregates of components

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Problem: Spatial assessments are currently captured in data management systems that are very different from each other

Challenges

1. **Identify the common elements** shared by all spatial sampling frames, and devise 'neutral' terms for referring to them. This will help to increase data comparability by use of the same language. The proposed neutral terms are defined in the Glossary below.
2. **Create a data structure** that connects each monitoring Result (or Endpoint) to the exact spatial component (or aggregate thereof) in which it was measured, make the structure **flexible** to accommodate any protocol, and make it **compatible** with existing water quality data management systems. This will facilitate data exchange.
3. **Capture** the information about any spatial sampling frame or any of its components on a **virtual map** that can be stored in a database and/or easily transferred to a Geographic Information System (GIS). This will enable use of locative media to present and share results.

Spatial Sampling Frames

Can share the following properties:

- A 'Grid' made of a number of components
- Flexible (variable angles)
- Multi-dimensional
- A structure with internal hierarchy

They can easily be defined in neutral terms: each Frame has

- An origin
- A direction (upstream or downstream)
- A known curvilinear distance.

The **Origin** can be mapped to a Permanent Station and/or Monument

Curvilinear distances can be measured on a tape placed on the thalweg, or the centerline, or the centroid.... Every Frame or grid has a “**backbone**” of sorts

Mapping is so much easier with a Backbone!



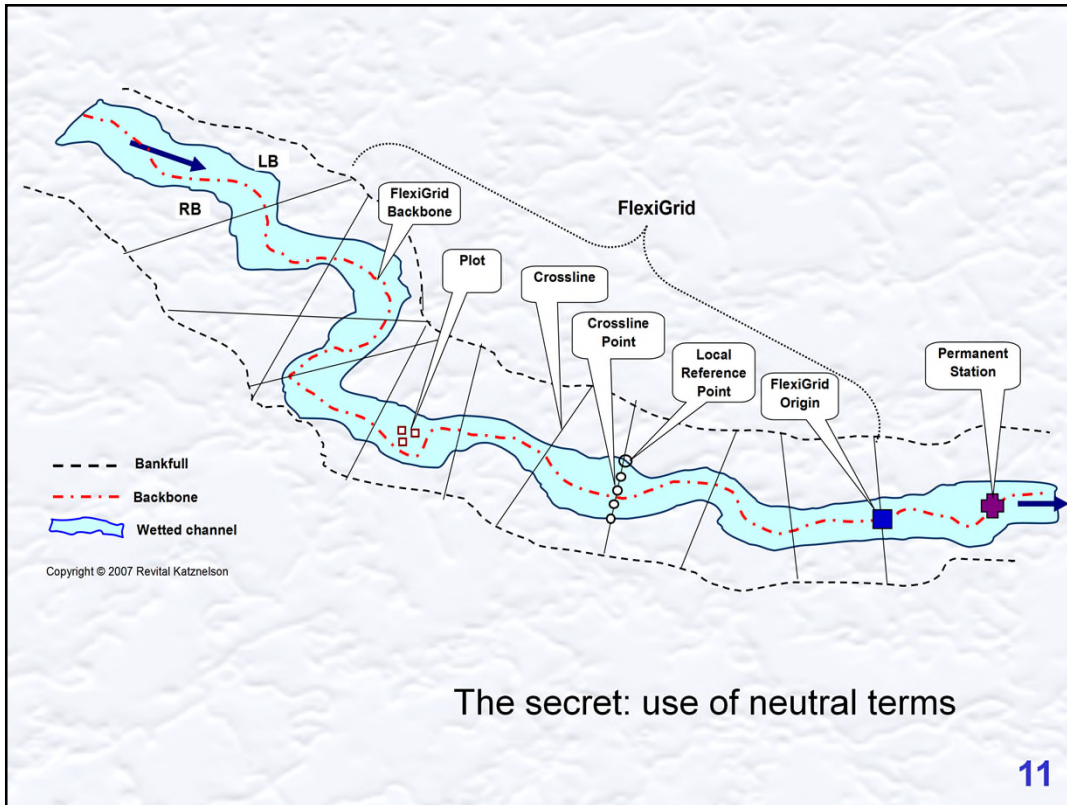
We are talking about “a spatial multi-dimensional flexible sampling frame with a variety of components, some organized with an internal hierarchy” (in short, SMDFAFWVCIH).

I called it “A FlexiGrid”

A FlexiGrid with a unique ID is laid out on a stream channel by one Team in one Station Visit. A Team can lay out one or more FlexiGrids in one Visit, each with its own unique ID.

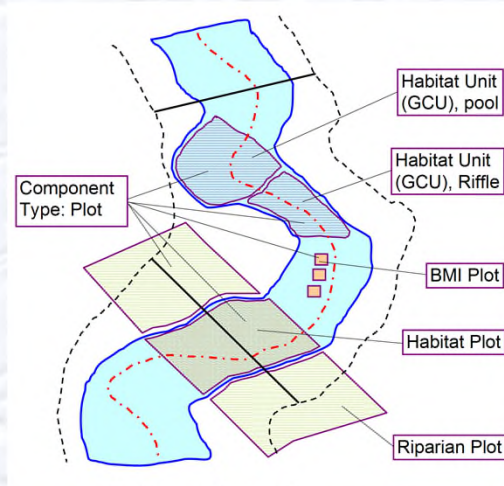
The FlexiGrid refers to permanent locations, but is not permanent itself (FlexiGrids may be laid out differently at different times).

The FlexiGrid concept can be applied to different scales.



The FlexiGrid is a Concept

It is a way of organizing information about spatial components of complex sampling frames to enable:



A plot is a plot is a plot

- (a) Description and mapping of the Frame and each component within the frame
- (b) Linking each assessment Result to the component in which it was collected.

Common Data Elements

(These are added to the 'generic' Station-Visit descriptors:
Project, Trip, Team, Date, Time, Station, Station-Visit ID, etc.)

List 1: FlexiGrid (Frame) Descriptors

FlexiGrid **Origin ID**

FlexiGrid distance **units** (m, ft)

FlexiGrid Origin **distance from permanent Station** [/monument]

FlexiGrid **Type** (transects&points, right-angle grid, string of hab units, etc.)

FlexiGrid **Backbone** (Thalweg, midstream, centerline, centroid)

FlexiGrid Positive-distance **direction** (Upstream, downstream)

List 2: FlexiGrid component descriptors

FlexiGrid Component **ID** [naming conventions can reflect hierarchy]

FlexiGrid Component **Type** (e.g., Stream-fragment, Crossline, Plot, Point, Vertical, River-Parallel, Crossline-point, etc.)

FlexiGrid Component **Name in Protocol** (e.g., Reach, Transect, Transect-point, BMI Plot, etc.); [these are protocol-specific]

FlexiGrid Component Pre-determined **size [/shape, /boundaries]**

FlexiGrid Component **backbone-distance from Origin**

FlexiGrid Component **place in series**

FlexiGrid Component **distance from Local Reference Point**

Local Reference **Point type** (e.g., Left-bank)

FlexiGrid Component **depth from surface**

FlexiGrid and FlexiGrid component descriptors

Remember: Any of the spatial components you have defined can be included in the FlexiGrid; you do not HAVE TO snap them to the grid (i.e., to map them) with distances or depth measurements

But if you want to, you CAN!

All you need is ... a spreadsheet.

And I already had a spreadsheet. Actually, I had more than one, I had the entire workbook of the Project File.

Timeline: Pre-History

The Data Quality Management (DQM) system was developed for field measurements in 1998-2001, and implemented by the SWRCB Clean Water Team (Citizen Monitoring Program). In 2006 it was published as part of the Clean Water Team Toolbox and is available on line

http://www.waterboards.ca.gov/water_issues/programs/swamp/cwt_toolbox.shtml

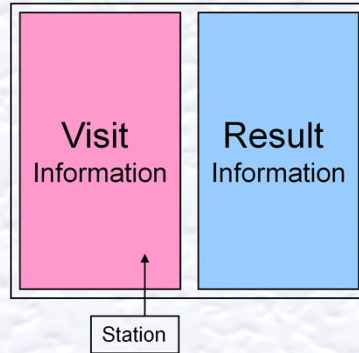
The major spreadsheet in the DQM Project File

Station Visit Information						Result Information					
Project ID	Team Name	Date	Station Visit ID	Station Visit start time	Permanent Station ID	Instrument ID	Characteristic	Result	Result unit	Accuracy	Precision
WIL03	Rkcrew	6/22/2003	T1V1	10:47	WIL070	TTP-STB01	Temperature, water	14.57	C	-1.44 %	0.06 %, RPD
WIL03	Rkcrew	6/22/2003	T1V1	10:47	WIL070	ECP-STB01	Specific conductance	758.7	uS/cm	-0.14 %	0.40 %, RPD
WIL03	Rkcrew	6/22/2003	T1V1	10:47	WIL070	DOP-STB01	Dissolved oxygen (DO)	11.08	mg/l	-5.00 %	6.92 %, RPD
WIL03	Rkcrew	6/22/2003	T1V1	10:47	WIL070	PHP-STB01	pH	8.34	pH	0.71 %	0.12 %, RPD
SLC95	RD crew	5/3/1995	RD05-v1	10:10	SLC116	EC-2SLC02	Specific conductance	780	uS		
SLC95	RD crew	5/3/1995	RD05-v1	10:10	SLC116	FLO-SLC01	Velocity	0.67	ft/sec		

The Field Result Table is linked to everything else: Location, Instrument, Organization, etc., all present in the Project File workbook

I developed a data quality management system built on Excel spreadsheets that capture all the bits of information one needs to see, but until 2007 it all focused on a point (or a line).

The basic Results spreadsheet: a schematic



Everything was simple when the Station was a point.

Station Visit Information						FlexiGrid Information				FlexiGrid Component Information												Result Information				
Project ID	Team Name	Date	Station Visit ID	Station visit start time	Permanent Station ID	FlexiGrid Origin ID	FlexiGrid distance units	FlexiGrid Origin distance from permanent Station	FlexiGrid type	FlexiGrid section	FlexiGrid justify distance Direction	FlexiGrid Component ID	FlexiGrid Component Name in Protocol	FlexiGrid Component Name in Protocol	FlexiGrid Component section-distance from Origin	FlexiGrid Component place in series	FlexiGrid Component distance from local ref point	Local ref point type	Local ref point distance from section	FlexiGrid Component Aggregate	Characteristic	Result	Result unit	Result type	Endpoint type	
SYCM09	PW crew	6/15/2010	PW05-v1	9:50	SYC050	F035	m	23	terrestrial Aquaria	Thalweg	Upstream	F035-R1	Stream-Phragmites	Ranch Jones 2010	0	n/a	n/a	n/a	n/a	BM plus	Index of biological integrity (IBI)	67	(none)	Calculated endpoint	Compound endpoint	
SYCM09	PW crew	6/15/2010	PW05-v1	9:50	SYC050	F035	m	23	terrestrial Aquaria	Thalweg	Upstream	F035-R1	Stream-Phragmites	Ranch Jones 2010	0	n/a	n/a	n/a	n/a	n/a	Slope Separately	Average slope	4.5	%	Calculated endpoint	Simple endpoint
SLC95	RD crew	5/3/1995	RD05-v1	10:10	SLC116	FG-R005	m	35	Stream Aquaria	Thalweg	Upstream	FG-R005-CCS	Cobble	CCRS 1990	25	2	n/a	n/a	n/a	n/a	n/a	Stream width	4.8	m	Individual measurement	n/a
SLC95	RD crew	5/3/1995	RD05-v1	10:10	SLC116	FG-R005	m	35	Stream Aquaria	Thalweg	Upstream	FG-R005	Stream-Phragmites	CCRS 1990	n/a	n/a	n/a	n/a	n/a	n/a	n/a	Average Stream Width	5.3	m	Calculated endpoint	Simple endpoint
SYCM09	PW crew	6/15/2009	PW05-v1	9:50	SYC050	F035	m	23	terrestrial Aquaria	Thalweg	Upstream	F035-R1-PLUS	Plat	BIM Plat Smith 2003	67	6	5.8	LB	5.9	n/a	Estimated percent Cobble	10	%	Estimated number or numeric range	n/a	
WL-yr3	MD crew	5/12/2009	MD02-v2	13:50	WL32	FGW12	m	48	terrestrial Aquaria	Midstream	Upstream	FGW12-R1-IPC	Plat	Ranch plat (SNAF)	18	2	n/a	n/a	n/a	n/a	n/a	Big Tree Canopy cover	10-40	%	Estimated number or numeric range	n/a

Project ID	Team Name	Date	Station Visit ID	Station Visit start time	Permanent Station ID
SYCM09	PW crew	6/15/2010	PW05-v1	9:50	SYC050
SYCM09	PW crew	6/15/2010	PW05-v1	9:50	SYC050
SLC95	RD crew	5/3/1995	RD05-v1	10:10	SLC116
SLC95	RD crew	5/3/1995	RD05-v1	10:10	SLC116
SYCM09	PW crew	6/15/2009	PW05-v1	9:50	SYC050
WL-yr3	MD crew	5/12/2009	MD02-v2	13:50	WL32
SUIS06	LM crew	4/7/2009	LM21-v1	13:40	SUI085
WL-yr3	MD crew	5/12/2009	MD02-v2	13:50	WL32
WL-yr3	MD crew	5/12/2009	MD02-v2	13:50	WL32

FlexiGrid ID, Component ID, and everything you need to know about them

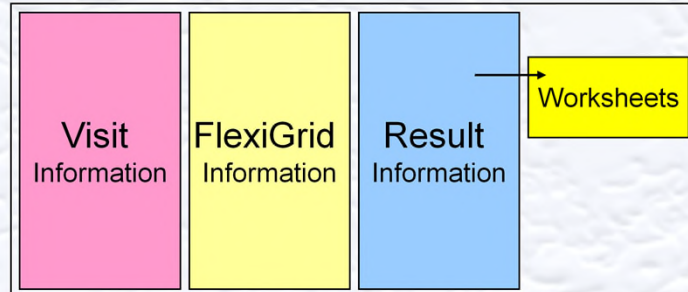
Characteristic	Result	Result unit	Result type	Endpoint type
Index of biological integrity (IBI)	67	(none)	Calculated endpoint	Compound endpoint
Average slope	4.5	%	Calculated endpoint	Simple endpoint
Stream width	4.8	m	Individual measurement	n/a
Average Stream Width	5.3	m	Calculated endpoint	Simple endpoint
Estimated percent Cobble	10	%	Estimated number or numeric range	n/a
Big Tree Canopy cover	10-40	%	Estimated number or numeric range	n/a
Particle d50	34	mm	Calculated endpoint	Quantile
Stream width	13.5	m	Individual measurement	n/a
Water depth	0.43	m	Individual measurement	n/a

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Once you have identified the data elements, you can build a spreadsheet!

The FlexiGrid Results spreadsheet, Part 1

(Data Entry Template)



This spreadsheet has been customized several times.
Each version served as a **data entry template** for a specific SOP

Assessment Endpoints

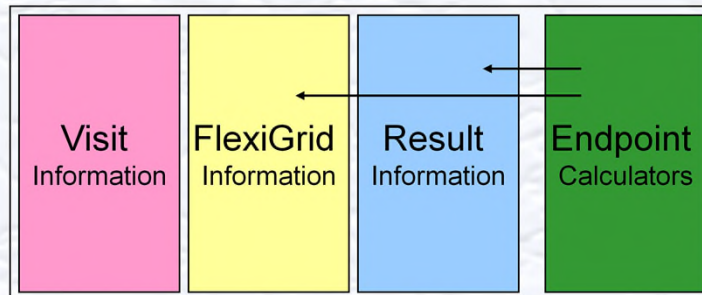
Descriptive statistics (Average, Frequency), Metrics, Indices, and any other Endpoint calculated for an aggregate of raw data.

Examples: Average wetted channel width, Percent cobble, Landfill/Trash Human Influence Index

Trip start date	SV start time	Permanent Station ID	FlexiGrid Component place in series	Characteristic	Result	Result unit	Processed Result (Formulae!)	Result [Endpoint]	Unit	Characteristic [Endpoint]	Components Aggregate for Endpoint	Number of observations in aggregate (n)
4/13/2005	8:45	201EAS050	1	Boulders cover	1	(code)	5	11	%	Average Boulders cover	Habitat Plots	11
4/13/2005	8:45	201EAS050	2	Boulders cover	1	(code)	5					
4/13/2005	8:45	201EAS050	3	Boulders cover	0	(code)	0					
4/13/2005	8:45	201EAS050	4	Boulders cover	1	(code)	5					
4/13/2005	8:45	201EAS050	5	Boulders cover	0	(code)	0					
4/13/2005	8:45	201EAS050	6	Boulders cover	1	(code)	5					
4/13/2005	8:45	201EAS050	7	Boulders cover	2	(code)	25					
4/13/2005	8:45	201EAS050	8	Boulders cover	0	(code)	0					
4/13/2005	8:45	201EAS050	9	Boulders cover	2	(code)	25					
4/13/2005	8:45	201EAS050	10	Boulders cover	2	(code)	25					
4/13/2005	8:45	201EAS050	11	Boulders cover	2	(code)	25					

The FlexiGrid Results spreadsheet , Part 2

(with Endpoint Template pasted on the right)

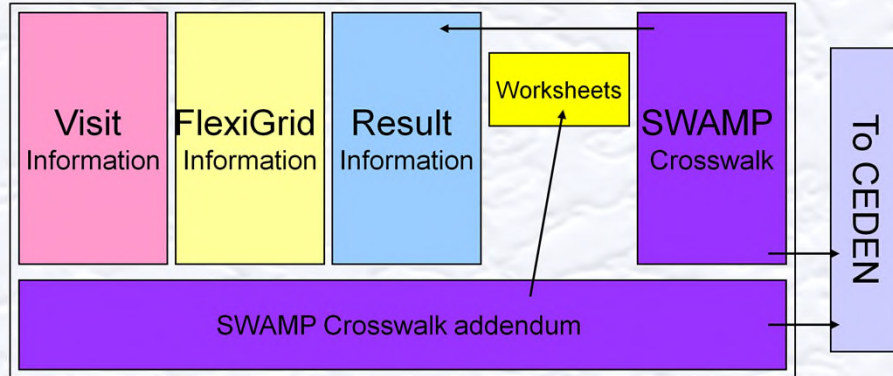


The Endpoint Calculation Template developed for SWAMP has been customized to calculate an array of Endpoint, mostly per the EMAP protocol (Kaufmann et al 1999)

This system allowed for capturing, mapping, and calculating endpoints for several years of data when no alternative was available.

The FlexiGrid Results spreadsheet, Part 3

(With SWAMP Crosswalk pasted or Built-in)



This spreadsheet has been used in the San Francisco Bay Regional waterboard as a Data Entry Template in 2010-2013, and can be used (in the office or in the Field) for future work

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When the SWAMP raw PHAB data module and its upload template was functional, it was simple to add columns and rows to the data entry template (shown in purple); these purple cells are “looking” at red-yellow-blue cells in the original FlexiGrid spreadsheet – where the data is entered - and “translating” the contents into SWAMPese. The crosswalk products in the purple cells are easily isolated directly into the SWAMP upload template and transferred to SWAMP or CEDEN, the central data exchange network used in California.

Summary Part 1: The FlexiGrid concept supports a data structure that can do the following:

- Connect each monitoring Result to the exact spatial component it was measured in (or to aggregate thereof);
- Stage the raw data for easy, streamlined derivation of descriptive statistics, metrics, indices, and any other Endpoint;
- Place every spatial component on a 'virtual map' as an independent entity while preserving the internal hierarchy and its order in a series;
- Enable reconstruction of the Frame from the virtual map that is stored in database cells; and allow information transfer into a GIS system;

Summary Part 2: More good things FG can do

- Integrate physical habitat (PHAB) results and descriptors with results and descriptors from any other area of inquiry (e.g., chemistry, toxicity, bioassessment, etc.);
- Enable reporting of any type of Result and Endpoint, generated for any Characteristic in any spatial component and at any scale, on the 'same page'; and
- Accommodate data generated by any Protocol that has multiple spatial components, including PHAB protocols used by different Agencies and Programs (e.g., NAWQA, EMAP, EPA RBP), DFG Fisheries habitat, etc.

Currently available: All FG templates for SWAMP, plus all SOPs for streamlined data processing and transfer

Summary Part 3: Drawbacks

- Tailoring the FlexiGrid spreadsheet to a given protocol requires real understanding of that protocol
- Development and customizing of the templates requires focused thinking and advanced Excel skills
- Although data entry and streamlined endpoint derivation can be done by anyone, the Excel Data Entry Template cannot support as many 'fool-proof' safeguards against erroneous entries as some other database systems, and it is harder to protect
- Users need training and technical support

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The most practical drawback is that users need training and technical support.

Practically speaking ...

- Users need training and technical support

But this is true for any data management system.
FlexiGrid help is available and it does not cost much.

The FlexiGrid is a good option for small monitoring entities that have no funding for massive data management and no access to IT support.

It is just an Excel spreadsheet!

Thanks!

San Francisco Bay Region (RB2) SWAMP Team 2007-2014:
Matt Cover, Karissa Anderson, Carrieann Lopez, Annika Anderson,
Peter Otis, Karen Taberski, David Williams, Kevin Lunde, Caitlin
White

Alameda County Clean Water program 2008
Arlene Feng, Paul Salop

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Carrieann Lopez, Richard Fadness

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Management Team 2010-2014:
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